



DEPARTMENT OF HUMAN SERVICES
SENIORS & PEOPLE WITH DISABILITIES
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AUTHORIZED BY: _____
Administrator

INFORMATION MEMORANDUM
SPD-IM-02-065
Date: November 13, 2002

TO: Area Agency on Aging Directors CHS SDA Managers
CHS/AAA Field Managers and Staff CHS SDA Assistant Managers
SPD Managers and Staff CHS Central Office Managers

SUBJECT: 2003 SPD Training Calendar

INFORMATION: This calendar incorporates training sessions from all of SPD. It contains the primary offerings for eligibility workers and case managers whose jobs have elements of financial eligibility, service eligibility and/or protective services associated with SPD Programs. SPD sponsored computer system training is also listed. Course descriptions and dates of delivery are included.

The website for the calendar is: <http://www.sdsd.hr.state.or.us/resources/spd.pdf>

When you open Acrobat Reader you will notice Bookmarks on the left side. The trainings have been grouped by function. For instance, trainings with a Case Manager focus can be accessed as a group by clicking on the Case Management bookmark. As always please read the course descriptions to see who the expected audience is; the preferred order of participation in the modules; and the skills and knowledge the trainee needs to bring to the session.

The website address for registering for the courses is:
http://dhstraining.hr.state.or.us:591/Training/Search_CourseList.htm

If you require assistance in using the On Line Training System, please contact Amy Namitz

CONTACTS: Amy Namitz for phone registration assistance **PHONE:** 503-378-8908
E-MAIL: Amy.R.Namitz@state.or.us **FAX:** 503-378-5878

CONTACTS: Dale Marande for calendar information **PHONE:** 503-945-6476
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Updated 11/12/02

*Registration for many of these training sessions can be completed via the
[DHS On-line Training Registration System](#).*

CASE MANAGEMENT

Basic Developmental Disabilities (DD) Case Management Training

Description: A two-day training for newly hired case managers, employed by Oregon's County Mental Health Programs. This training is provided through Seniors and People with Disabilities. Other training opportunities for experienced Case Managers are being planned.

2003 training dates: February 5-6
April 10-11
June 5-6

Client Assessment and Planning System (CA/PS)

Description: Participants will be introduced to the components of case management. They will utilize the (CA/PS) on Oregon ACCESS to assess a client & provide care planning.

2003 training dates: February 3-7 August 4-8
May 12-16 November 3-7

Community Based Care (CBC) 512

Description: Covers payment process screens, utility screens, and the Cookbook. This system is used for payments to community based care facilities.

Expectations: Registrants will have experience working with the 512 system, including entering a 512 on-line

Skills needed: basic keyboard and CA/PS system skills

2003 training dates: January 15-16 September 17-18
March 11-12 October 29-30
May 21-22 December 17-18
July 9-10

Eligibility/Case Manager Intensives

Description: The intensive conferences are intended as continuing education for case managers and financial workers who have been through the training modules and are wanting more in-depth information on specific topics. The sessions offered are based upon requests and suggestions from field staff and managers. Please contact Lauren Mitchell with session suggestions. Lauren can be reached at 503-945-6479, lauren.e.mitchell@state.or.us or by GroupWise.

Expectation: Registrants will be able to determine eligibility for either service or non-service cases prior to the intensives.

Skills needed: Basic eligibility worker and/or case manager skills

2003 conference dates: September 24-25

Medicaid-Services

Description: Covers waived services, client liability, trusts, resource assessments.

Expectation: Registrants will understand basic eligibility and the basic determination process. It is recommended that participants have attended the introduction to eligibility module.

Skills needed: Basic eligibility worker skills, use of Internet Program/Rules Manual.

2003 training dates: January 9

July 17

March 20

October 16

May 8

December 11

PAS Specialist On-going In-service Training

Descriptions: The content varies with the focus around current nursing and medical issues. The training sessions provide in-depth information on various topics as determined by the planning committee.

2003 training date: March 5, 2002

Serious Event Review Team (DD)

Description: Training sessions provided as needed. Sessions cover system instruction and enhanced training on what the system provides.

2003 training dates: TBA

DISABILITY ANALYST

New Disability Analyst Training

Description: 9 week course for newly hired disability analysts – covers basic Social Security disability policy and procedure.

2003 training dates: None at this time.

Social Security Disability Evaluation Process Orientation

Description: Brief overview of the SSA-DDS process. It is offered on an as needed basis.

2003 training dates: TBA

ELIGIBILITY WORKER

Basic Worker Skills

Description: Overview of Agency - field & central office structure/mission statement & philosophy, Social Security Act Overview of Programs, concepts of programs/eligibility/etc. acronyms/waivered services basics In-depth training on: WEBM, FIND/Internet Manuals/Help Windows.

Expectations: Registrants will have experienced a basic overview of their local CHS/AAA, the branch's clients and work flow. They will have entered, assisted or observed another worker in entering a CMS and/or FS case into Oregon ACCESS and the mainframe.

Skills needed: Basic keyboard skills

2003 training dates:	January 14-16	July 8-10
	February 25-27	August 12-14
	March 25-27	September 16-18
	April 29-May 1	October 21-23
	June 3-5	December 2-4

Eligibility/Case Manager Intensives

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Expectation: Registrants will be able to determine eligibility for either service or non-service cases prior to the intensives.

Prerequisite: Basic eligibility worker and/or case manager skills.

2003 conference dates: September 24-25

Employed Persons with Disabilities (OSIP)

Description: Covers disability, adjusted income calculation, EIE, approved account, client contribution, computer entry.

Expectations: Registrants will understand basic Medicaid eligibility and the eligibility determination process. They will be expected to be currently responsible for EPD cases and have a need for more in-depth understanding of specific areas of policy.

Prerequisite: Basic Worker Skills and Introduction to Eligibility.

2003 training dates: January 22-23 July 23-24
April 2-3 October 1-2

Food Stamps

Description: Financial and nonfinancial eligibility factors relating to the food stamp program.

Expectations: Registrants will learn about basic Food Stamp eligibility and the eligibility determination process. Registrants are expected to be currently responsible for a FS caseload.

2003 training dates: January 28-30 June 17-19
February 4-6 September 9-11
May 13-15 October 28-30
*Additional training dates available through the
[DHS On-line Training Registration System](#)*

Introduction to Eligibility

Description: Basic nonfinancial & financial program eligibility, use of of rule & policy manuals, overview of CMS data entry.

Expectations: Registrants will have worked with their SPD/CAF Internet Resources as part of eligibility decision and/or case planning.

Prerequisite: Basic Worker Skills

2003 training dates: January 27-31 July 28-August 1
March 10-14 October 6-10
April 14-18 November 17-21
May 19-23 December 15-19
June 23-27

General Assistance

Description: Disability decisions, collecting medical evidence, cooperation, financial & nonfinancial eligibility factors.

Expectations: Registrants will understand basic Medicaid eligibility and the eligibility determination process. They will also be expected to be currently responsible for a GA caseload and have a need for more in-depth understanding of specific areas of policy.

Prerequisite: Basic Worker Skills and Introduction to Eligibility.

2003 training dates: February 11-13 April 22-24
July 15-17 October 14-16

Medicaid-Eligibility

Description: Covers Medically Needy Program, QMB Program, protected eligibility, accessing medical care.

Expectation: Registrants will understand basic eligibility and the basic determination process. It is recommended that participants have attended the Introduction to Eligibility module.

Prerequisite: Basic Worker Skills and Introduction to Eligibility.

2003 training dates:	January 8	July 16
	March 19	October 15
	May 7	December 10

Oregon ACCESS – Overview

Description: A broad overview of the ACCESS System. This is a ½ day course that follows the Basic Worker Skills (see above).

Skills needed: Basic keyboard skills.

2003 training dates:	January 16	July 10
	February 27	August 14
	March 27	September 18
	May 1	October 23
	June 5	December 4

Oregon ACCESS – Basic

Description: Registrants will gain basic knowledge of the framework of the Oregon ACCESS computer system. They will learn to navigate within ACCESS, be able to enter a new application, learn how to make changes, print forms, integrate ACCESS with CMS and use the Reports and Ticklers tools.

Expectations: Registrants will have experience working with ACCESS.

Skills needed: Basic computer skills and a basic understanding of Medicaid eligibility policy.

2003 training dates:	January 22	July 22
	February 13	August 28
	March 13	September 18
	April 24	October 14
	May 29	November 18
	June 26	December 9

PROTECTIVE SERVICE

Adult Protective Services (APS) – Community

Description: Overview of community protective services, legal authority, basic intervention & investigation skills, specific types of abuse, special issues, collaborations, legal interventions, entry of protective service reports on ACCESS.

Expectations: Registrants will assume responsibility for conducting protective service investigations in the community (non-facility) setting. Priority will be given to new investigators. Registrants will have received, and will bring to the training, the *SPD Adult Protective Services Manual, Volume II: Community Investigations*.

Skills needed: Basic interviewing and intervention skills, basic knowledge of community resources.

2003 training dates: March 10-14
June 16-20
December 1-5

APS – Facilities

Description: Overview of facility protection services, types of abuse, legal authority, screening and intake, referrals, investigation, writing the report, interventions, & legal issues.

Expectations: Registrants will assume responsibility for conducting protective service investigations in facility settings, including nursing facilities, adult foster care, residential care, assisted living, and room and board. Priority will be given to new investigators. Registrants will have received, and will bring to the training, the *SPD Adult Protective Services Manual, Volume I: Facility Investigations*. Registrants will be expected to complete both Part One and Part Two of the same training session.

Skills needed: Basic interviewing and report writing, general knowledge of facility operating requirements.

2003 training dates:	Part I	Part II
	January 28-30	February 11-13
	May 13-15	June 3-5
	August 5-7	August 19-21
	November 4-6	November 18-20

APS in Adult Foster Care

Description: Overview of protection services, types of abuse, legal authority, screening and intake, referrals, investigation, writing the report, interventions, & legal issues specific to adult foster care.

2002 training dates: December 4-5

APS - Report Writing

Description: In depth skills required for proper documentation of APS cases in the community and facilities. Topics include framing the allegation, reviewing evidence for relevance and credibility and logical analysis of evidence in order to reach a factual set of findings that will support corrective or legal action.

Skills needed: Basic APS Facility Training or APS Community Training

2003 training dates: April 15-17
October 7-9

APS for Screeners

Description: Examines the multiple roles played by screeners of adult protective service calls. These may include: determining whether the call meets criteria for APS, making appropriate referrals, making initial determination of the required response time, and conducting the initial interview with the complainant.

Recommended for any staff making initial response to calls alleging abuse or neglect.

2003 training dates: July 22-23
September 23-24

APS for Supervisors

Description: An overview for those supervising adult protective service staff.

We will cover policy and practice for screening, investigating, intervening in and documenting cases in the community and in facilities.

2003 training dates: March 25-26
October 21-22

Adult Protective Services/Law Enforcement Conference

Description: This year's conference is designed for APS staff and law enforcement personnel, enhancing knowledge and skills in investigating and prosecuting financial exploitation crimes against elders and people with disabilities.

Expectations: Registrants will be either APS staff or Law Enforcement Personnel.

2003 conference dates: TBA

SUPPORT STAFF

Oregon ACCESS – Support Staff

Description: This training is geared toward office support staff. It will include such things as basic navigation, how to search, inquire, do case transfers, print reports, use the ticklers and add to the providers and resource directory within ACCESS.

2003 training dates:	January 23	July 29
	February 20	August 27
	March 18	September 17
	April 23	October 9
	May 6	November 13
	June 10	December 16

Support Staff Conference

Description: The support staff conference is intended for ALL support staff. Typical conference sessions include: “best practices”, increasing customer service skills, gaining a greater understanding of the customers we serve, and a review of SPD/CHS/AAA policy and procedures. Sessions are tailored to meet the needs of our support staff. Please contact Lauren Mitchell with session suggestions. Lauren can be reached at 503-945-6479, lauren.e.mitchell@state.or.us or by GroupWise.

2003 conference dates: June 11-12

SURVEYOR/LICENSER

Adult Foster Home Licenser's Training (Quarterly)

Description: Program and Policy updates for licenser's.

2003 Training Dates: TBA

Community Based Care Survey Orientation

Description: A formal orientation program for Assisted Living Facility and Residential Care Facility surveyors (currently under development). For new hires as well as experienced surveyors.

2003 training dates: TBA

Nursing Home Surveyor Blue Moon Conferences

Description: Conferences for all CCMU surveyors. Scheduled on an as needed basis as federal and/or state rules, regulations and survey procedures change. The content is based on current issues.

2003 training dates: TBA

Nursing Home Surveyor On-going In-Service Training

Description: For experienced surveyors. Offered statewide and scheduled as issues arise. They are coordinated with office unit meetings.

2003 training dates: TBA